
ENTERPRISE CONTENT MANAGEMENT/DOCUMENTUM SUPPORT

STATEMENT OF WORK

Estimated hours: 2,000

BACKGROUND

The Environmental Protection Agency (EPA) currently utilizes the Enterprise Content Management (ECM) Documentum technology as the technical platform to address Federal requirements in the area of electronic records management. By using the ECM tools for Records Management, the Office of Environmental Information (OEI) developed an agency-wide ECMS E-mail Records application which has been deployed to the majority of EPA organizations.

The Enterprise Content Management platform environment includes a number of native ECM Application Integration, Content and Data tools and services. Organizations can benefit from utilizing this platform by leveraging the available ECM services, OEI's metadata standards, and the re-use of developed code.

OVERVIEW

The Office of Research and Development (ORD) has deployed the ECMS E-mail Records application nationally across all ORD research laboratories, offices and centers, and plans to expand the use of ECM Documentum to include providing options for applications/systems/data that have specific requirements for information and knowledge management solutions. This will entail the use of certain ECM application integration and content services currently available in EPA's ECM environment.

In May, 2007 ORD initiated an ECMS project which consisted of investigating the ECM capabilities and services currently installed and available within the EPA environment. This project also involved assessing the use of ECM within ORD. Based on the findings, an ORD ECMS Strategic Plan was developed to identify specific small and mid-scale ECM solutions that can be applied across a broad range of requirements. Certain recommendations from this plan will be implemented according to ORD priorities.

ORD has also initiated a scientific taxonomy effort with the goal of developing a controlled vocabulary which will be used when addressing issues of scientific records management and to assist scientists and managers in accessing, distributing, and exchanging scientific data and other information relevant to ORD's research. This controlled vocabulary will facilitate internal and external collaboration by reducing ambiguity and by increasing clarity and transparency.

Recommendations from the ORD ECMS Strategic Plan and results of the scientific taxonomy effort will be considered when developing requirements for work completed under this task order. There is particular interest in integrating ECMS records management, document lifecycle, and library processes into proposed technical solutions for the work completed under this task order.

PURPOSE AND SCOPE

The purpose of this Task Order is to provide technical support in the areas of Requirements Development, Conceptual Analysis and Application Development using ECM Documentum technology in the development/modernization of applications that support certain business functions within the ORD organization.

This Task Order will address the three tasks outlined below:

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| Task I: | Task Order Management |
| Task II: | Project Planning and Functionality Review |
| Task III: | Proof of Concept |

- Provide a graph using a vertical axis for dollars and a horizontal axis for expenditures against the total estimated cost of the Task Order.
- A list of deliverables and/or activities performed for each task order during the reporting period.
- A status listing of all approved/unapproved/pending approval requests received by the contractor during that month with associated status disposition and all requests pending completion on current and any previous monthly report with projected completion date. The numbers of hours required to complete each request shall be provided and any deviations from projected completion date shall be quantified and described.

Subtask C. Financial Reporting

ORD requires a mechanism for providing costs and estimates at the project/work request level with the capability to track costs to the various tasks identified in this Task Order. All costs associated with projects and/or work requests shall be reported in the monthly report by project/application/special code level as well as at an aggregate level. All costs associated with specific project codes shall be reported in the monthly report, and as specified in the individual work request.

- Project codes shall be established before technical work begins. Work estimates shall include costs associated with each major project milestone/phase.
- All cost-tracking for work to be billed should include information to identify the following:
 - a. Task Order Number
 - b. Task Number
 - c. Project/Application Name
 - d. Special project code specified by EPA/ORD
 - Create financial reports and track costs at a detailed level and produce standard reports as well as ad hoc reports;
 - Changes in established project codes must be reviewed by the Requestor, and approved by the TOCOR.
 - Costs shall be included in the monthly financial report due by the 15th of the month following the month reported.
 - Additional financial reporting requirements will be specified in the individual work request/technical direction document.
 - Reports shall be accurate, clear, complete, timely and in accordance with the requirements in the work request. Information in the monthly progress reports should be consistent with costs identified in the associated monthly invoice and consistent with generally accepted accounting principles.

Subtask D. Work Request Handling and Tracking

The Contractor shall also provide a method for monitoring project management, including work status, at no cost to the government.

EPA will utilize a centralized web interface to submit work requests to the Contractor. The Contractor shall provide EPA with a method for accepting/handling work requests that are submitted via the centralized web interface. This may require accommodating and providing a process for data exchange between the web interface and the Contractors' proposed/internal work request system.

Task I Deliverables	
Subtask I-A-1: Task Order Management Plan	15 Calendar days after Task Order award
Subtask I-B-1: Progress Reporting	On or before the 15th day of each month
Subtask I-C-1: Financial Reporting and Cost Tracking	On or before the 15th day of each month
Subtask I-D-1: Work Request Handling and Tracking	30 Calendar days after Task Order award

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- Written documentation detailing the technical approach required to implement the solution(s) in the EPA/ORD application environment
 - Written documentation providing the solutions used to address technical limitations as they relate to the applied solution/approach
 - System Test & Validation Plan
 - Demonstration of technical solution addressing requirements as identified
 - Deployment Plan/Schedule
 - System/Technical Administration Guide
 - User Guide/Training Material
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DELIVERABLE ACCEPTANCE CRITERIA:

- All deliverables must be technically accurate, complete, clear, concise, timely, and grammatically correct and address the subject matter as required by customer.
- During the review of deliverables the Task Order COR shall have the right to reject or require correction of any deficiencies found in the deliverables. In the event of rejection of any deliverable, the contractor will be notified in writing by the TOCOR of the specific reasons why the deliverable is being rejected. The contractor shall have 10 calendar days to correct the rejected deliverable and return it to the TOCOR. The following acceptance criterion applies to all tasks.
- The appropriate system testing/independent verification and validation, and quality control activities must be successfully executed for all applications/systems developed under this task order.

(a) The BPA Project Officer is the primary representative of the Contracting Officer authorized to provide technical direction on task order performance.

(b) Individuals other than the BPA Project Officer may be authorized to provide technical direction. A TOCOR, Technical Monitor, or other designee is authorized to provide technical direction, subject to the limitations set forth below, only on his/her task order.

(c) Technical direction includes:

(1) Direction to the contractor which assists the contractor in accomplishing the Performance Work Statement.

(2) Comments on and approval of reports or other deliverables.

(d) Technical direction must be within the scope of the BPA and the task order performance work statement. The BPA Project Officer or any other technical representative of the Contracting Officer does not have the authority to issue technical direction which (1) institutes additional work outside the scope of the BPA, task order; (2) constitutes a change as defined in the "Changes" clause; (3) causes an increase or decrease in the estimated cost of the BPA, task order; (4) alters the period of performance; or (5) changes any of the other expressed terms or conditions of the BPA, task order.

(e) Technical direction will be issued in writing or confirmed in writing within five (5) calendar days after verbal issuance. One copy of the technical directive document will be forwarded to the Contracting Officer and the BPA Project Officer.

Other Direct Costs and Travel

(1) Other Direct Costs--Other Direct Costs (ODCs) are items which are allowable and allocable direct costs to the task order for which EPA may reimburse the Contractor. Such items shall be charged in accordance with the Contractor's established and accepted accounting practices except as stated below. The Task Order COR (TOCOR) may provide approval for materials and supplies up to \$500.00 (for a single item or a related group of items). For costs beyond \$500, the EPA Contracting Officer's approval is required. This consent is only intended to be a determination of technical reasonableness and is not a pre-determination as to the allowability of these costs. Equipment is considered to be "facilities" for the purpose of Part 45 of the Federal Acquisition Regulation and, with certain exceptions, may not be reimbursed as a direct charge to the contract.

(2) Travel—Travel up to of \$1,000.00 for a single trip (e.g. one trip for 3 people or 1 trip for 1 person) is allowable as a charge to this task order with prior written consent of the TOCOR. Travel in excess of \$1,000.00 for a single trip (e.g. one trip for 3 people or 1 trip for 1 person) is not allowable as a charge to this task order without prior written consent of the Contracting Officer. Except as explicitly set forth below, the Contractor shall be reimbursed for allowable and allocable travel costs actually incurred by and paid to the Contractor's employees, provided such costs do not exceed the amount that would be payable to an employee of the Environmental Protection Agency conducting the same travel while on Government business. In determining the dollar value of allowable contractor employee travel costs, the limitation of the Federal Travel Regulations effective on the date of travel will apply to contractor employees to the same extent they apply to Federal Government employees.

(3) The Contractor may be required to furnish to the Contracting Officer documentary proof of every travel expenditure that exceeds twenty-five dollars (\$25), including receipts for common carrier transportation expenditures. Bona fide lodging receipts may be required to be submitted by the Contractor along with the monthly invoices.

(4) The Contractor may elect to reimburse its employees for meals and incidental expenses (as defined in the Federal Travel Regulations) on a per diem basis, and the Contractor will be reimbursed for such payments. In no event shall the reimbursement allowed under this provision exceed the standard per diem for meals and incidental expenses allowable under the Federal Travel Regulations.

(5) To the maximum extent practicable consistent with travel requirements, the Contractor agrees to use the reduced air transportation and hotel/motel rates and services provided through available Government discount air fares and lodging rates for bona fide employees' travel that is otherwise reimbursable as a direct cost pursuant to this contract when use of such rates results in the lowest overall cost. The Contractor shall submit requests, including pertinent information, for specific authorization to use these rates to the Contracting Officer.

Travel Required By Contractor Staff

(3) The Contractor agrees that these task order conditions concerning the use and disclosure of CBI are included for the benefit of, and shall be enforceable by, both EPA and any affected businesses having a proprietary interest in the information.

(4) The Contractor shall not use any CBI supplied by EPA or obtained during performance hereunder to compete with any business to which the CBI relates.

(b) The Contractor agrees to obtain the written consent of the CO, after a written determination by the appropriate program office, prior to entering into any subcontract that will involve the disclosure of CBI by the Contractor to the subcontractor. The Contractor agrees to include these provisions, including this paragraph (b), in all subcontracts awarded pursuant to this task order that require the furnishing of CBI to the subcontractor.

Handling Confidential Business Information

The Contractor shall notify the Government if any situation arises where contractor personnel may have had access to confidential business information, or sensitive information. The situation shall be handled in accordance with CBI related clauses in the contract and the Contractor shall promptly deliver the material to the TOPO for appropriate action.

Release of Contractor Confidential Business Information

(a) The EPA may find it necessary to release information submitted by the Contractor either in response to this solicitation or pursuant to the provisions of this task order, to individuals not employed by EPA. Business information that is ordinarily entitled to confidential treatment under existing Agency regulations (40 C.F.R. Part 2) may be included in the information released to these individuals. Accordingly, by submission of this proposal or signature on this task order or other contracts, the Contractor hereby consents to a limited release of its CBI.

(b) Possible circumstances where the Agency may release the Contractor's CBI include, but are not limited to the following:

(1) To other Agency contractors tasked with assisting the Agency in the recovery of Federal funds expended pursuant to the Comprehensive Environmental Response, Compensation, and Liability Act, 42 U.S.C. Sec. 9607, as amended, (CERCLA or Superfund);

(2) To the U.S. Department of Justice (DOJ) and contractors employed by DOJ for use in advising the Agency and representing the Agency in procedures for the recovery of Superfund expenditures;

(3) To parties liable, or potentially liable, for costs under CERCLA Sec. 107 (42 U.S.C. Sec. 9607), et. al., and their insurers (Potentially Responsible Parties) for purposes of facilitating settlement or litigation of claims against such parties;

(4) To other Agency contractors who, for purposes of performing the work required under the respective contracts, require access to information the Agency obtained under the Clean Air Act (42 U.S.C. 7401 et seq.); the Federal Water Pollution Control Act (33 U.S.C. 1251 et seq.); the Safe Drinking Water Act (42 U.S.C. 300f et seq.); the Federal Insecticide, Fungicide and Rodenticide Act (7 U.S.C. 136 et seq.); the Resource Conservation and Recovery Act (42 U.S.C. 6901 et seq.); the Toxic Substances Control Act (15 U.S.C. 2601 et seq.); or the Comprehensive Environmental Response, Compensation, and Liability Act (42 U.S.C. 9601 et seq.);

(5) To other Agency contractors tasked with assisting the Agency in handling and processing information and documents in the administration of Agency contracts, such as providing both preaward and post award audit support and specialized technical support to the Agency's technical evaluation panels;

(6) To employees of grantees working at EPA under the Senior Environmental Employment (SEE) Program;

(7) To Speaker of the House, President of the Senate, or Chairman of a Committee or Subcommittee;

(3) The Contractor is not entitled to unemployment compensation benefits under the Social Security Act, as amended, by virtue of performance of this task order.

(4) The Contractor is not entitled to workman's compensation benefits by virtue of this task order.

(5) The entire consideration and benefits to the Contractor for performance of this task order is contained in the provisions for payment under this task order.

(e) Notice. It is the Contractor's, as well as, the Government's responsibility to monitor task order activities and notify the Contracting Officer if the Contractor believes that the intent of this clause has been or may be violated.

(1) The Contractor should notify the Contracting Officer in writing promptly, within 5 calendar days from the date of any incident that the Contractor considers to constitute a violation of this clause. The notice should include the date, nature and circumstance of the conduct, the name, function and activity of each Government employee or Contractor official or employee involved or knowledgeable about such conduct, identify any documents or substance of any oral communication involved in the conduct, and the estimate in time by which the Government must respond to this notice to minimize cost, delay or disruption of performance.

(2) The Contracting Officer will promptly, within 5 calendar days after receipt of notice, respond to the notice in writing. In responding, the Contracting Officer will either:

(i) confirm that the conduct is in violation and when necessary direct the mode of further performance;

(ii) countermand any communication regarded as a violation;

(iii) deny that the conduct constitutes a violation and when necessary direct the mode of further performance;
or

(iv) in the event the notice is inadequate to make a decision, advise the Contractor what additional information is required, and establish the date by which it should be furnished by the Contractor and the date thereafter by which the Government will respond.